APPLICATION FOR CONTRACT EXCHANGE/PLAN-TO-PLAN TRANSFER TO TDRA

Pension Fund of the Christian Church

Complete this *Application for Contract Exchange/Plan-to-Plan Transfer to TDRA* to initiate a tax-free transfer to your 403(b) account under the Tax-Deferred Retirement Account of the Pension Fund of the Christian Church (Disciples of Christ) ("TDRA"). The transfer may include amounts held in a designated Roth account. Any Roth transfers will be tracked separately and subject to the tax rules applicable to Roth contributions.

You must already have a TDRA account or contemporaneously complete and submit a *TDRA Enrollment Form* with this Application before you can transfer money to the TDRA. You may complete a tax-free transfer in one of two ways:

- **Contract Exchange**: If Pension Fund is one of multiple investment providers under your employer's 403(b) retirement plan, you may use this form to transfer your account held with another investment provider under the plan to an account under the TDRA.
- **Plan-to-Plan Transfer**: If, in addition to the TDRA, your employer sponsors another 403(b) retirement plan or a 401(a) retirement plan (including a 401(k) plan), you may use this form to transfer your account under the other retirement plan to the TDRA.

Contract exchanges and plan-to-plan transfers are not treated as a distribution of your retirement plan account. Following a transfer, your transferred accounts will be subject to distribution restrictions at least as stringent as those in effect under the transferor plan or contract.

Complete a separate Application for each contract exchange or transfer.

- PLEASE TYPE OR PRINT CLEARLY -

I. MEMBER INFORMATION

Name ______________________________ Account No. ______________
(first) (middle) (last/family) (if also opening a TDRA, write "TBA")

☐ ***Check here if there has been a change to your contact information on file.***

Home Address ______________________________

City ______________ State ______________ Country ________ Zip Code________-______

Daytime Phone Number (_________)______________ E-Mail Address ______________________

II. TRANSFER INFORMATION

Attach a copy of the most recent account statement from the transferor retirement plan or contract.

The transfer is from: ☐ a 403(b) plan or contract or ☐ a 401(a) plan (including a 401(k) plan).

If you are a minister, check one: ☐ 100% or ☐ $__________________ of my transfer represents income for services performed while a minister and in the exercise of my ministry.

Name of Transferor Plan ______________________________ Account/Contract No. ______________

Name of Custodian/Trustee/Investment Provider ______________________________

Mailing Address______________________________

City ______________ State ______________ Country ________ Zip Code________-______

Phone Number (________)__________________ Approximate Account Value $______________________

Transfer Instructions for Custodian/Trustee/Investment Provider of the Transferor Retirement Plan/Contract: Please transfer the full or partial value of the plan or contract identified above directly to the TDRA, a section 403(b)(9) retirement income account plan maintained by Pension Fund of the Christian Church, as follows:

☐ Liquidate and process a partial transfer of $__________________ or ___________% of my plan account or contract directly to my TDRA account.

☐ Liquidate and process a transfer of my entire plan account or contract directly to my TDRA account.

MAKE CHECK PAYABLE TO: **Pension Fund of the Christian Church**

For the benefit of [*Insert Name of Account or Contract Holder*]

III. DESIGNATED ROTH ACCOUNT INFORMATION [COMPLETE ONLY IF APPLICABLE]

Complete this Section III only if any amount of the transfer represents amounts from a designated Roth account. You must attach documentation from the transferor plan or contract to substantiate this information.

☐ 100% or ☐ $________________ of my transfer is from a designated Roth account under a 403(b) or 401(k) retirement plan.

My basis in the designated Roth account at the time of transfer is $ ______________. The first year of contribution is ____________.

IV. MEMBER CERTIFICATION AND SIGNATURE

By signing this Application, I make the following certifications:

- I certify that the transferor retirement plan or contract permits this exchange or transfer.
- I understand that this exchange or transfer is not a distribution, and that I may not take a distribution from the TDRA until I have a severance from employment or meet another distribution event, such as attain age 59½.
- I understand that Pension Fund will rely on the representations I have made on this Application, and I hereby release Pension Fund from any liability regarding the accuracy of these representations.
- I have attached a copy of the most recent account statement from the transferor retirement plan or contract, and, if the transfer contains any amounts from a designated Roth account, I have attached documentation to substantiate the information provided in Section III.

My signature on this Application authorizes the custodian/trustee/investment provider of the transferor plan or contract to release any and all information regarding my account to Pension Fund in any form requested by Pension Fund.

Member Signature ____ **Date** _______/_______/______

Return the completed Application, most recent account statement, designated Roth information (if applicable), and a check from the current trustee or custodian to Pension Fund at the address below.

IMPORTANT: Retain a copy of this completed Application for your records.

Pension Fund of the Christian Church
P.O. Box 6251, Indianapolis, Indiana 46206-6251
Toll Free Phone: 1.866.495.7322 • Phone: 317.634.4504 • Fax: 317.634.4071
E-mail: pfcc1@pensionfund.org • Website: www.pensionfund.org

In reliance on the above certifications, Pension Fund agrees to accept the above exchange or transfer for the benefit of the above member, which will credited to the member's TDRA account.

Pension Fund Representative ____ **Date** ________/________/________

[Do not write in this box – for Pension Fund use only]